Creating a Travel Authorization

When to Create a Travel Authorization
1. For FOREIGN trips, authorizations are required in TREX for division approval and DOE approval.
2. For DOMESTIC trips, check your division's requirements regarding authorizations in TREX.
3. Once saved or submitted, use the **LBNL Trip #** for Carlson or Cliqbook
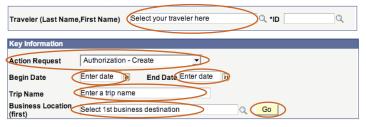4. The system does not allow authorization for local travel.

Log in ▶
1. Enter TREX in your browser's URL field
2. Enter LDAP UserID and password

Create your Travel Authorization
1. Click on *Berkeley Lab Travel Expenses*.
2. Click on *Manage Trips*.
3. Select *Authorization—Create* in the *Action Request* field.
4. Enter data in required fields as shown in the screen shot.
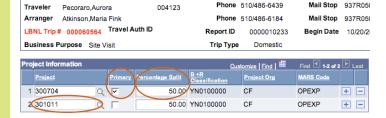5. Click on the *Go* button.

6. In the next screen, select the business purpose for your trip.
7. Select *Foreign*, *Domestic* or *Local* in the *Trip Type* field.
8. Enter the statement of purpose for your trip here.
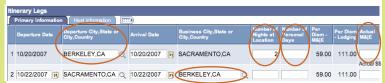9. Click on *Next* to enter projects, locations and expense estimates.

10. At the top of the screen, enter one or more projects. To split projects, click on "+" to add additional projects.

If more than one project, the percentage should total 100%, and a primary project must be selected.

11. Enter the departure city and the location to which you will return. You can enter the number of personal days.
    - For foreign trips the departure city is the airport city.
    - For domestic trips the departure can be the traveler's home, work, or airport location.
12. To add trip legs, enter the number of nights then click on "+" on the right. If you need to remove a leg, click on "-".
13. As shown below, per diems display based on business city location.
14. If you know actual estimated amounts for M&IE and/or lodging, enter the daily amount in the *Actual* field.

15. If the actual lodging exceeds the per diem, scroll to the right and enter the justification.

16. For foreign trips, click on the Host Information and Foreign tabs to enter required information in all fields.
17. For Conferences, enter at least the conference name.

18. At the bottom of the screen, enter estimated miscellaneous expenses in the *Misc* field.
19. In the *Total Air* field, enter your airfare estimate.
20. In the *Paid by Others* field, enter cost expected to be paid by a third party. This amount is only for information purposes.
21. Click *Update Estimated Costs* to display total estimated costs.

22. For **Domestic trips:** You see two yellow buttons at the bottom of the screen.
23. Click on *Finish and Submit* to complete your authorization in TREX, otherwise save for later.

24. For **Foreign trips:** You see three yellow buttons at the bottom of the screen.
25. Click on the 2nd button to select the Approver.
26. Click on the third button to submit a Foreign Authorization for approval.